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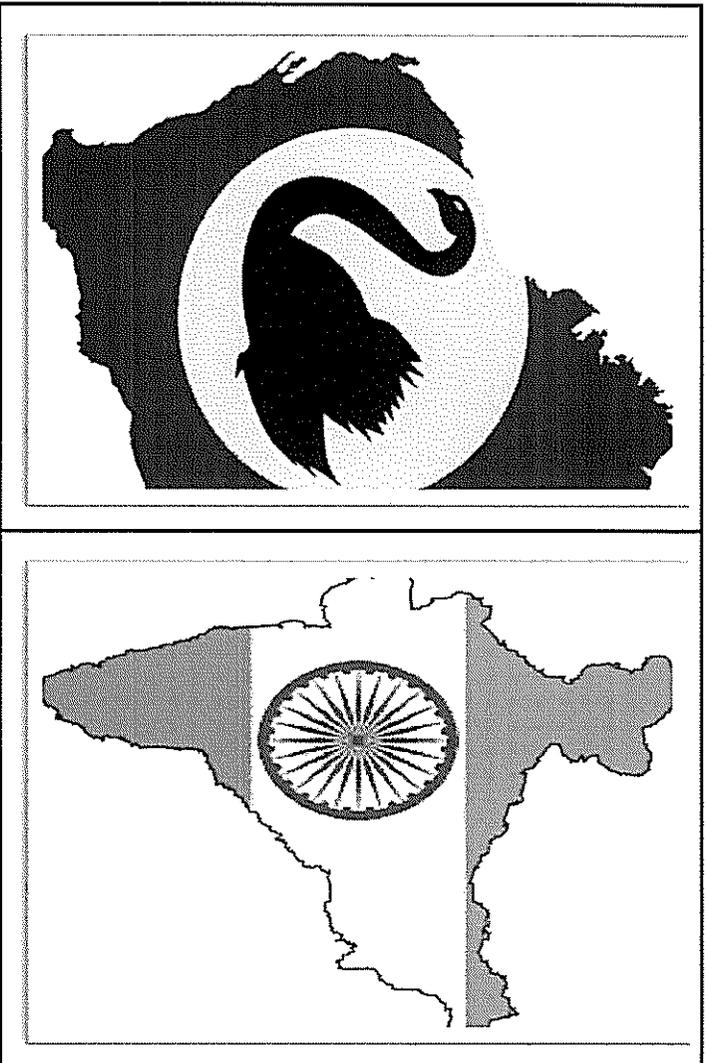
**An inquiry into the growing
importance of Indian-West Australian
relations**

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A Parliamentary Internship Report Prepared by Paul McIlree

For the Hon Liz Behjat, MLC

December, 2013



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Executive summary

Purpose

This report was written for the Honourable Liz Behjat (MLC), in conjunction with Murdoch University's Parliamentary Internship Programme. The purpose of this paper is to examine the growing importance of the trade and economic relationship between Western Australia and India. The intent is to educate readers of the many opportunities and mutual benefits that can be derived from a close and cooperative relationship.

Main findings

The main findings discerned in the production of this report include:

1. India is a country endowed with immense potential and the capacity to become an economic powerhouse in the 21st century. Nevertheless, the obstacles India must overcome on its path to development are as monumental as the potential it possesses;
2. The challenges facing India represent significant opportunities for Western Australia and create potential for a wide array of mutually beneficial cooperative ventures;
3. Trading relations have diminished in recent years (since 2008-9), yet a look further back demonstrates a 48% growth in total merchandise trade between 2003 and 2013. In 2012-13, total trade between WA and India was worth \$AUD4.3 billion;
4. Western Australia's education sector had 11,825 Indian student enrolments and 3,521 commencements in 2012-13. Three of the five sectors examined have shown declines in Indian student participation in the period 2003-2013. However, growth in the other two sectors far outstrips the declines seen in these three sectors. India remains WA's 3rd largest source of international student and represents a market with significant scope for future expansion;
5. As of 2011, there were 40,303 people of Indian ancestry residing in Western Australia, with Indian migration to WA increasing 163% between 2001 and 2011. Indian migrants offer WA more than just an important source of skilled labour. They offer our state a cultural diversity that provides opportunities to increase familiarity and improve two-way mobility with India. It also positively affects WA's tourism revenue;
6. Indian tourists are visiting WA more frequently and since 2009, yearly spending by Indian tourists has risen 32%. 13,800 Indian tourists spent \$AUD50 million in 2012. Rising affluence and capacity to travel means the Indian tourist market holds great potential for future expansion; and
7. Despite a rich history of cooperation, recent Lowy Polls demonstrate negative perceptions in the wider Australian-Indian bilateral relationship. Both sides would benefit from concerted efforts at improving these unfortunate perceptions.

Conclusion

The WA-India relationship is of growing importance precisely because of the challenges confronting India on its path to further development. WA possesses a natural capacity to assist India's rise, and in the process, both sides stand to benefit. India gains by acquiring essential resources and services required to sustain its growth and overcome the obstacles to its progress. WA stands to benefit from the enormity of India's market, and the much-needed diversification it offers WA's trade and investment portfolios.

The fact that the relationship remains strong despite slowdowns in economic and student interchange since 2008 serves to highlight that with the right focus, a rapid recovery in this aspect of the relationship is possible. The overall 48% growth in Total trade activity between 2003 and 2013 should serve to remind investors that ours is an enduring relationship best viewed from a medium to long-term perspective.

Main recommendations

A number of recommendations derive from the preparation of this paper, though not all are specifically addressed in the body of this work:

1. Investors in both WA and India should look past recent downturns and stay focussed on the medium to long-term prospects;
2. Significantly more emphasis from both sides needs to be put toward actively seeking out and promoting the many opportunities for mutually beneficial exchange that can be found within and between WA and India;
3. Negative perceptions discerned by recent Lowy polls need to be appreciated, understood (in itself representing an intriguing field of enquiry beyond the scope of this report) and reversed with on-going and targeted public relations campaigns;
4. WA should focus on implementing the Department of Foreign Affairs and Trade's 3 strategies for improved Australian-Indian ties. This could be helped by:
 - i. Increasing the frequency of high-level ministerial delegations from WA to India promoting trade and investment links;
 - ii. Utilising the Indian student and migrant community as a springboard for improving perceptions, increasing cultural awareness and familiarity;
 - iii. Creating sister-city ties; and
 - iv. Capitalising on the potential 'friendly' games of cricket have in terms of improving our diplomatic relations and image with India's citizenry.

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Introduction

On the 15th of August 1947, Mahatma Gandhi and Jawaharlal Nehru of the Indian Congress Party led India to independence from centuries of British colonial rule. Attaining independence was an almighty achievement, a struggle that occurred over decades. Since then India has faced significant challenges: overpopulation, environmental degradation, extensive poverty, food, water, energy and physical security concerns name but a few. Yet India-watchers know the world's biggest democracy and second-most populous country on earth holds fantastic potential: economic growth following reforms in 1991 and an immense, youthful, entrepreneurial population are driving India's emergence as a regional power well positioned to dominate an Asian century.

The purpose of this paper is to examine the relationship between Western Australia (WA) and India, and to educate both WA and Indian audiences of the immense benefits a strengthened relationship can offer. It draws attention to the extraordinary potential India possesses, and highlights how Western Australia's comparative advantages perfectly position it to become an instrumental ally in assisting India realise its potential. This report does not intend to ignore the great many obstacles facing the Indian sub-continent. Conversely, the central theme is that where there is challenge, there also lay opportunity.

The WA-Indian economic relationship is of growing importance on both sides precisely because of the challenges confronting India. Numerous commonalities of interest exist between these great states and a strong bilateral relationship is mutually advantageous. It promises WA an immense market with opportunities to expand and diversify its current trade and investment portfolios, while providing India an abundant supply of resources and services essential to sustaining its impressive growth and developmental destiny. Our ties are historic, with India playing an important role in the evolution of the fledgling WA colony. The relationship has since broadened and deepened, and now WA finds itself ready, willing, and able to facilitate the rise of India in the 21st century.

This report contains 5 main sections. It begins with an overview of India's impressive development and incredible prospects for future growth, owing much as it does to its entrepreneurially minded and immense human capacity. Nevertheless, impeding India's prodigious potential are colossal challenges, and the second section of this report outlines some of the more pressing concerns facing the Indian Government and its people.

The third section proceeds to our past, highlighting linkages that existed between

what was to become Western Australia and India as early as 1828. WA-Indian history fundamentally characterises our present relationship: challenge and adversity bringing about opportunities for cooperation in order to overcome obstacles to development.

Sections three and four concern our present relationship and provide the paper's primary focus - the economic relationship between WA and India. It highlights spheres of cooperation in some of India's most pressing areas of concern, namely: pressures derived from population growth; services and infrastructure required to sustain growth and trends toward urbanisation; food and water security; and India's need for resources and energy to satiate the demands of a rapidly developing economy. These sections also illuminate trends pertaining to migration and tourism from India to WA, and explore the quantity of Indian students receiving an education in WA and in which sectors they study. The paper's fifth section provides observations on the perceptions that India and Australia hold of the other, and suggests methods to ensure the continued deepening of our relationship.

From the evidence provided, it will appear that recent trends in our economic relationship are not promising, with general declines in West Australian exports to India and reduced student numbers in WA since 2008-09. However, a longer-term look at the decade from 2003 until 2013 demonstrates discernible growth across nearly every sector examined in this paper. Thus, despite recent downturns and underperformance, it is this paper's central conclusion that WA-Indian relations are not only growing, but are set to become increasingly important for both sides. Ours is a relationship best characterised as a marathon, not a sprint, with medium to long-term trends and opportunities for growth remaining extremely promising.

This report is both timely and important because greater awareness and understanding of the other promises so much at a critical time for each of our economies. It aims to encourage Western Australia's Government and businesses to look west toward our Indian Ocean neighbour for growing opportunities, and to remind India that WA offers more than a resource pit, but represents a potential 'one-stop-shop' on their path toward development. Western Australia has a natural capacity for feeding India's incredible and increasing appetite for energy, commodities, education, services, and agricultural products. For India, investment in WA promises to provide much of what the country needs in order to overcome the adversity it faces at home.

Recent declines in the overall value of our economic relationship represent just

another speed bump along a historic journey of WA-India interaction. Like many of the challenges faced in the past, cooperation, perseverance, and patience will overcome. If both states are to benefit from one another's comparative advantages, recent declines must be reversed and renewed emphasis directed toward educating the other of the many opportunities and benefits that can be derived from this important partnership.

1. India rising

1.1 India's human potential

India's rise owes much to its fantastic human potential. With 1,220,800,359 estimated inhabitants, it is the world's second-most populous country. By 2028, India's population is expected to overtake China's, with predictions of 1.45 billion inhabitants¹. This demographic comprises a rapidly growing middle class - expected to reach more than 250 million by 2015 - and an increasingly urbanised, youthful population. Seventy-five percent of Indians are below 35 years of age and fifty percent are younger than 25. Each year after 2015, the number of Indian's turning 20 years will approximate Australia's entire population². Over the coming decades, India is projected to add between 12 to 15 million workers to its labour force each year³, and by 2022, India is expected to account for 25% of the world's labour force⁴.

1.2 India's economic potential

This tremendous human capital adds significant weight to expectations that India will become one of the largest economies of the 21st century. It already ranks 3rd in terms of purchasing power parity, and is the world's 10th largest economy overall⁵. In terms of Gross Domestic Product (GDP), India is the Asia Pacific's 3rd largest economy.

India's economic situation has radically improved in recent decades, owing much to progressive reforms initiated in the 1990s across a range of sectors. The economic rise has been driven by strong fundamentals including an abundance of skilled labour, increased government spending, a sophisticated financial market, a mature judiciary and strong investor protections⁶. Movements toward a market-led growth strategy, increasing the role of the private sector, and greater focus on exports and inward foreign investment proved instrumental to achieving an impressive 8% per annum growth between 2002 and 2008. Nominal GDP almost trebled from less than US\$0.5 billion in 2000, to US\$1.3 trillion in 2010. India's high returns environment earned it the rank of second in global Foreign Direct Investment (FDI) for that year⁷.

The Global Financial Crisis (GFC) in 2008 slowed India's upward march and recovery has thus far been limited in part due to depressed global growth and its own halting economic reform. Nonetheless, India's comparatively modest slowdown during the GFC demonstrated the resilience and macroeconomic integrity of its economy⁸. It was

hoped that reforms announced in late 2012 would revive growth, but a slowdown to 5.2% in 2012 and signs of difficulty in 2013 such as the declining value of the Rupee, growing current account deficit, and general macroeconomic uncertainty are discouraging some investors⁹. Observers believe that in order for India to sustain growth rates of the last decade and benefit the financial sector in the long-term, it must continue to open its economy, reduce regulation, engage structural reform and tighten governance¹⁰. However, with an election due by May 2014, it will prove challenging for Prime Minister Manmohan Singh and the Indian Congress Party to achieve further reform.

Despite present difficulties, forecasts for the medium to long-term remain promising. Projections are that India's economy will grow at an average annual rate of 6.75% until 2025¹¹. Construction, agriculture and services have been and are expected to endure as the vanguard of growth, yet India's manufacturing sector is likely to remain weak¹². The service sector remains India's economic bulwark, providing a 54.7% contribution to India's GDP in 2011¹³.

2. India's demands for future development

India's diverse and colossal population presents not only fantastic potential, it also represents one of its greatest challenges. This conundrum is emblematic of the wider Indian situation: the only thing comparable to India's inspiring potential is the seemingly insurmountable difficulties it must overcome if it is to become a 21st century powerhouse. The core challenges to India's prosperity over the next twenty years will be ensuring that energy supplies, skills development and infrastructure grow sustainably¹⁴. More broadly, there are a number of other areas of concern:

- Population pressures – youthful yet aging;
- Urban growth and development;
- Food and water security;
- Resource and energy deficiencies; and
- Labour constraints and skill shortages.

2.1 Population pressures – youthful yet aging

Despite an overwhelmingly youthful demographic, there will be growing challenges to care for India's aged population. By 2030, around 22% of India's population, roughly 300 million people, will be over 50. According to the United Nations, by 2050 that proportion will reach 54%, approximately 587 million people¹⁵. Caring for such vast quantities of aging will create obvious infrastructure, services, healthcare and economic challenges for younger generations.

2.2 Urban growth and development

In many parts of the country, urban infrastructure is in dire need of renovation, exacerbated by staggering growth in physical size and population of many Indian cities. A recent report into India's infrastructure and services suggests that India's urban population will rise from 310 million in 2010, to 600 million people by 2031. The report recommends that roughly US\$700 billion be spent on urban infrastructure through to 2031 in order to accommodate the forecasted growth. The main areas of expenditure recommended in the report include roads, transport, urban renewal and redevelopment, water supply and sewerage¹⁶.

2.3 Food and water security

As India's population continues to swell pressure on water resources, food production, and the impact on the environment all increase. Without an appropriate and immediate

response, India could face severe water shortages, the spread of infectious diseases from contaminated water, and an increase in mosquito-borne diseases such as malaria¹⁷.

Climate change, changing diets and consumption patterns, inefficiencies in food production and distribution all add to concerns that India may become reliant on imports of essential food commodities in the next 5 to 10 years. According to The Indian Council for Research on International Economic Relations (ICRIER) report, there is an 'alarming' supply-demand gap for all basic commodities, including pulses, cereals, sugar, and edible oil. Without improved yields, the ICRIER report suggests that India will become import-dependent on food commodities for which it is currently self-sufficient¹⁸. Falling crop yields, erratic monsoons, inefficient agricultural technologies, poor logistics and handling are in part to blame, while a shortage of skilled farm workers exacerbate the situation. Indian government employment schemes, combined with the large-scale migration of people to cities in search of work are reducing the farming workforce, placing further pressure on India's already strained food and water security¹⁹.

2.4 Resource and energy deficiencies

India's energy and fuel requirements are monumental, aggravated by population growth, urbanisation, and rapidly rising automobile penetration. Based on 2012 GDP growth forecasts, India's energy consumption will increase 6% annually through to 2017, adding pressure to an already strained energy sector²⁰. Problematic and deficient energy supply is an impediment on the economy, and India's energy companies need to improve core capacities if they are to increase efficiency and productivity. Oil, natural gas, and coal are expected to remain the main fuels for electricity generation and the proportion provided by imports is set to increase. According to the Indian Planning Commission's latest 5-year plan, imported energy will account for 38% of total energy requirements from 2012 to 2017²¹.

2.5 Labour constraints

Despite impressive spending on education²², India faces an identifiable lack of skilled workers, which poses a potentially major impediment to productivity, growth, and overall competitiveness of India's economy. A recent report by Credit Rating Information Services of India Limited (CRISIL) highlighted key issues confronting growth in the potential workforce:

- Lack of adequate skills due to inadequate education and vocational training;
- Mismatch between employment need and skills availability; and
- Rebalancing of employment between agriculture, industry and services with the movement of population into the cities from towns and villages.

According to the CRISIL's report,

Although India will have the world's largest pool of working-age people by 2030, if the current trend in labour participation continues, only 539 million out of 962 million people of working age would be working by 2030.²³

2.6 Summary

Whilst the aforementioned challenges are significant, they are surmountable. India's rich human potential provides it with the human resource capacity to overcome the obstacles confronting continued growth and prosperity. The difficulties facing the country are also areas in which Australia and Western Australia in particular have significant capacity to provide assistance. Whether it be in areas of human services such as aged care, urban infrastructure construction and services, food and water production and technologies, resources and commodities, or even skills provision, WA is well-placed to assist our Indian Ocean neighbour. In doing so, both parties will continue to gain from a history of WA-India interaction already replete with examples of mutually beneficial cooperation.

3. WA-India: challenges, opportunities, and cooperation

3.1 WA-India history: Where have we come from?

WA and India share a long and often underappreciated history. As always, a look at the past can provide insight for today and useful instruction for the future. The history of Indo-WA relations mirrors the relationship of today, characterised as it was by significant potential and substantial challenges. In the beginning, however, it was British India that provided what was to become Western Australia the opportunities it needed to overcome many of the challenges it faced as a fledgling colony.

As far back as 1828, forward visionaries like Under Secretary to the British Government, Horace Twiss, and his close friend, Captain James Stirling, realised the commanding position and potential land in the West of Australia had for future trade with India²⁴. By 1833, there were visions of and efforts toward establishing an Anglo-Indian settlement near King George's Sound. Such visions met with immediate difficulty: the first ship that embarked from Calcutta with a load of passengers and stock never made its destination – that ship was lost at sea with all hands²⁵.

As early as 1834-5 - and true still today - was recognition that India's people could help the western colony overcome labour shortages: Captain Irwin was one who actively advocated introducing Indian convicts to assist construction of public works. The earliest arrivals came as servants and indentured labourers, followed by camel drivers and travelling merchants. By 1837, Indian settlers lived as far south as Albany, providing important skills and labour for overcoming the many challenges facing the infant colony²⁶.

Trade initiated early in the 1830s, with WA importing vital foodstuffs such as sugar, flour, rice, and tea²⁷. By the 1840s, India was proving a critical export destination for jarrah and sandalwood, and livestock in the form of horses, cattle, and sheep²⁸. By 1848, India was so desirous of South West jarrah to use as sleepers in railway construction that there was an (ultimately unsuccessful) attempt in Madras to form a Western Australian Timber Company to meet demand²⁹.

Western Australia survived its challenging infancy in no small part because of considerable export growth between the 1850s-60s, the proximity of India and the requirements of the Indian army providing the fledgling WA economy with a ready and important market³⁰. India's taste for WA gold began almost as soon as it was discovered in the 1890s, diversifying and increasing WA's volume of exports. From our earliest ties, WA

settlers looked west in appreciation and expectation of our India Ocean neighbour. Town planners even named Australind – a combination of the words Australia and India - for the close connection it was expected to have with the country³¹.

The march of time brings change, yet this snapshot of history shows that WA-India ties run deep and our histories closely intertwined. India was a country that provided opportunities in the form of imports, exports and skilled people that enabled early WA settlers to overcome the challenges they faced. It is now Western Australia's turn to help India rise above the challenges it faces, and in the process, cement a mutually beneficial relationship characterised by a long history of challenges creating opportunities and cooperation.

3.2 What does India need that WA can provide?

Just as India proved integral to Western Australia overcoming its challenges, WA can and should play a significant role in supporting India's rise. India's many challenges present just as many opportunities from which entrepreneurially minded actors could benefit. Western Australia is blessed with rich human capital and vast natural resources, able to offer a wide array of excellent service provision and abundant quality commodities. Given the comparative proximity, India is located well within a convenient operating zone for WA, thus enabling it to position itself as the state whose skills and resources facilitate India's growth.

As Tables 4.1.1.1 and 4.1.2.1 demonstrate, our current trading relationship is dominated by WA's resource sales to India. Gold (accounting for 72.9% of total exported commodities in 2012-13), copper, and other industrial inputs dominate exports. From India's vantage, WA imports are limited to some manufactures including motor vehicles, chemicals, crafts and textiles³². Recent investment from India, once dominated by IT, is now focussed on resources and infrastructure³³.

India is currently WA's 4th largest export destination for merchandise commodities, but there are important aspects of cooperation beyond resources and significant scope for further investment in other fields. Education in WA to fee-paying students from India is extremely important, and opportunities for WA education providers to become involved in India are immense. India's known necessities for sustained growth means the provision of a wide array of services promises to be another exciting, yet to date underexploited opportunity for West Australian businesses.

The Western Australia Trade Office's (WATO) India Office lists a litany of exciting 'priority industry sectors' that offer WA businesses diverse opportunities for investment in India³⁴. This report has a narrower focus however, analysing 8 especially important areas which can help grow our trade and investment relationship. These sectors include:

- Resources and mining;
- Energy;
- Infrastructure and development;
- Health;
- Environment;
- Education and Skills;
- Urban infrastructure; and
- Food.

3.2.1 Resources and mining

In order to cater for a rapidly expanding automobile sector, massive urban development and resultant infrastructure projects such as bridges, power generation, railways and airport modernisation, pressure to source commodities like iron ore, steel, zinc and aluminium has risen³⁵. As India prepares to construct one of the dominant economies of the 21st century, iron ore will be an especially integral requirement. Despite significant deposits of its own, Indian steel producers have started importing iron ore due to mining bans in Karnataka and Goa³⁶, presenting real potential for West Australian providers. BHP Billiton and Rio Tinto are two Australian mining companies that already have a foothold in India.

WA is Australia's leading producer and exporter of minerals, petroleum, and natural gas. The state is attracting interest from Indian investors, though there is room for expansion. In the resources sector there are a number of active Indian investments in Western Australia. Some of these include:

- The Birla Nifty Copper mine. Located in the Great Sandy desert, this mine was commissioned in 2004 and is operated by Indian company Aditya Birla Minerals, a market leader in the Indian copper industry;
- India's National Mineral Development Corporation Ltd. India's largest iron ore producer and a major shareholder in Legacy Iron Ore Ltd, a Perth-based Australian exploration company which focusses on the development of iron ore, coal, and gold deposits;
- Iron and Manganese company, S. K. Sarawagi and Co. Pvt Ltd, the flagship company of the SARAWAGI Group. The largest producer/exporter of Manganese ores from India, this company has a stake in Spitfire Resources Ltd - an emerging Australian resource company focused on the exploration and development of raw materials for the carbon steel sector; and

- Perdaman coal-to-urea fertilizer facility at Collie. This development project is creating fertiliser for agricultural use in India and elsewhere.

3.2.2 Energy

India's appetite for energy is insatiable, already ranking as the world's 4th largest energy consumer and the 3rd largest gas market in Asia³⁷. If growth projections remain accurate, energy shortfalls will exacerbate. To overcome this obstacle, the Indian Government's 12th Five Year Plan (2012-2017) has projected an ambitious 88,000 megawatts of new power generation capacity will be constructed in the next five years, representing an almost 50% increase over the current capacity of 200,000 megawatts³⁸. Australian resources companies like Santos and Dart Energy have already invested in gas-related activities in recent times and like-minded investors will do well to capitalise on India's desire for energy and the resultant investor-friendly policies promoted by their Government³⁹.

A number of Indian companies are actively investing in WA's energy sector. Some examples include:

- Petronet LNG Ltd, an Indian company formed to develop facilities for the import of LNG. They agreed in August 2009 to take 1.5 Mtpa of LNG for 20 years from ExxonMobil's share of the Gorgon venture. This agreement is valued at around \$AUD20 billion;
- Bharat Petro Resources Ltd, a wholly owned subsidiary of state-controlled Bharat Petroleum Corporation Ltd. They have a stake in a joint venture with Norwest Energy (as operator) and AWR Ltd. The joint venture's exploration interest is the Northern Perth Basin, which holds the potential to become WA's first shale gas province;
- Gujarat State Petroleum Corporation holds a working interest as part of a consortium in a block in the offshore Carnarvon Basin;
- Hindustan Petroleum Corporation Ltd, a Government of India Enterprise, also has a stake in a consortium exploring in the Carnarvon Basin; and
- Lanco Infratech Ltd - one of the Major Integrated Infrastructure Enterprises of India - acquired Griffin Coal operations through its Australian subsidiary, Lanco Resources Australia Pty Ltd (Lanco). This acquisition, in early 2011, was worth approximately \$750 million.

Western Australia's abundant resources are only one part of a much larger picture. There is also considerable scope for involvement in the improvement of India's relatively inefficient mining practices, and significant room for improving mine safety and mine rehabilitation in India⁴⁰. Australia's mining expertise is widely regarded as being at the forefront of world's best, and WA is well placed to offer valuable vocational skill training and mining services to Indian companies.

3.2.3 Infrastructure and development

By 2030, India is expected to have 68 cities inhabited by more than a million people and an urban population of over 606 million – a rise from the current 379 million⁴¹. As Indian cities swell, so too does its urban infrastructure crisis. To satiate their voracious appetite for growth, and in recognition of the need for rapid development, the Indian Government plans to invest US\$1 trillion on infrastructure in the country's 12th five-year plan, from 2012 to 2017.

India's irrepressible trend toward urbanisation and industrialisation, coupled with their desire to modernise and globalise their manufacturing sector, is creating exciting opportunities for research and technology collaboration and infrastructure service providers. Urban developers, town planners, architects, project managers, heritage conservation and construction companies can all benefit from cooperative ventures into India. Some Australian companies have already moved to assist in these areas, including for example, architects and town planners Jackson Architecture; urban conservation group AusHeritage; and construction companies such as Leightons and SMEC. The Sweett Group and GHD are also offering India's construction and mining sectors consulting services⁴².

3.2.4 Health services

India's staggering growth, especially its increasingly astute and wealthy middle-class, is creating enormous demand for a broad range of services beyond mining and construction that Western Australia is capable of and has experience in providing. For example, medical services for both young and old like childcare and aged care, health insurance provision, health care facilities, and trained staff all require rapid expansion if they are to meet the community and healthcare challenges facing the soon-to-be most populous nation on earth. On-line medical assistance, equipment, new hospitals, and access to clinics all need to increase to meet this demand.

One prediction is that 3.1 million additional hospital beds are required by 2018⁴³. Specialised care services such as nursing, aged care facilities and medical clinics also need significant development over the next 10 to 20 years. Given Australia's experience in catering for an aging population, there are real possibilities for Australian companies to satisfy a proportion of these needs⁴⁴.

The Indian Government has doubled spending in the healthcare sector in just 6 years, increasing investment inflows from US\$34.2 billion in 2006, to US\$78 billion in 2012⁴⁵.

India's healthcare challenges are opening significant opportunities in health and aged care services, with significant merger and acquisition opportunities in India from pharmaceutical, biotech and healthcare sectors⁴⁶. Australian companies like Cochlear and Resmed are already providing medical technologies to India, and given that pharmaceuticals, immunology, medical microbiology and genetics research from WA are regarded as world class, there promises to be much opportunity in the near future for this sector as well⁴⁷.

3.2.5 Environment

India has big plans for a green future, with intentions to build 24 new 'green cities' and plans to create the largest green energy plant in the world⁴⁸. Increasingly affluent and environmentally astute Indians are demanding a more sustainable future and quality of life, meaning environmental management will become another growth area. Improving water management and use, for example, is essential to overcoming challenges facing India's problematic water supply. Australia's experience and expertise in water conservation, irrigation, dry land farming, and project management place it in good stead to provide assistance in this area. Australian company eWater is already on the scene after signing an agreement with IIT Delhi regarding water modelling⁴⁹.

3.2.6 Education and skills

India's Education Sector is the largest capitalised space in India, attracting roughly 3.7% of the country's GDP. Education and skills development is receiving high priority as the Government aims not only to address the needs of the country's growing economy, but also to promote social equality⁵⁰. As a result, there are fantastic opportunities for collaboration with Indian education providers for the joint delivery of courses, content development, teacher training and development, and joint research projects⁵¹.

In recognition of the looming shortage of skilled labour, the Indian Government has set a target of providing skills training to 500 million workers across 30 sectors by 2022, with energy and mining, automotive, aviation, healthcare, and construction industries receiving particular focus⁵². Courses in IT, Retail, Banking and Financial Services, and English are also high in demand. The National Skill Development Corporation (NSDC) is the Government of India entity responsible for policy in this area, and they alone have a mandate to skill 150

million people by 2022⁵³.

Nonetheless, the NSDC have observed that India currently lacks the capacity to educate and train such vast volumes without assistance⁵⁴. India's skill requirements and the constraints on their capacity to provide sufficient training presents exciting prospects for cooperation with Western Australian education and skills providers. There is soon to be massive demand for training institutions and certified providers. Australian experience and expertise in building, operating, and staffing technical colleges position us well to assist India meet its ambitious targets.

There are already Australian companies operating in India's education sector. Western Australia's Education and Training International, for example, is facilitating operations in conjunction with India's Central Board of Secondary education and other Indian partners. They are offering developmental programmes for Indian training providers and other vocational skills that will assist India overcome its skills deficit⁵⁵. Other WA education providers currently active in India include:

- Murdoch University is actively collaborating with a number of Indian universities and seeking to establish strategic collaboration for international research partnerships in areas such as health, agriculture/food production, food security, energy, public policy/governance, international affairs, security and communications, to name a few. Murdoch is set to increase student exchange, offer joint degrees, establish visiting Professor programmes and PhD scholarships. Murdoch's Veterinary School is also undergoing accreditation by the Indian Government.
- Perth's Central Institute of Technology (CIT), is now operating across the country in a range of education sectors in concert with local providers: in the Vocational Education and Training (VET) sphere; in schools and industry; collaborative training with Private Organisations, and negotiating a higher education presence in Gujarat⁵⁶.
- WA's Curtin University is also entrenched in the Indian market after signing a Memorandum of Understanding with B.S.Abdur Rahman University in Chennai on the 21st May 2012. This agreement focusses on developing international academic programmes in strategic areas of engineering, business, information technology, Architecture, Nanotechnology, and materials science⁵⁷.

3.2.7 Food

Feeding India is an immense and growing challenge that promises WA agribusinesses significant scope for cooperation in this area. Senior Austrade Trade Commissioner Nicola Watkinson recently described India as a new trade frontier 'on the cusp of a food revolution'. She believes too much emphasis is directed toward China, and that now is the

time for Australia to turn its attention to India, especially if Australian agribusinesses are to capitalise on India's contemporary interest in Australian food products⁵⁸. India already allows 100% Foreign Direct Investment (FDI) in single brand retail firms and the Government's decision in September 2012 to allow 51% FDI in multi-brand retail opens the door for even more opportunities⁵⁹. This, combined with India's urgent need for new and improved technologies in farming production, provides considerable possibilities for food and agri-business suppliers, especially exporters of seed, equipment, and services. According to the WA Trade Office for India, opportunities for WA companies also exist in:

- Pre and post harvesting technologies and new irrigation methods;
- Supply Chain infrastructure and logistics including cold storage facilities and transportation of fresh and processed foods;
- Research and Development for hybrid crop varieties; and
- GIS based systems for soil and land use, cropping system, and crop weather watch⁶⁰.

The country's expanding middle class and growing wealth accompanies changing diets and consumption patterns, creating new challenges for feeding India. For example, growing affluence and trends toward urbanisation are creating a greater desire for convenience foods. Combined with increased incidences of eating out, there is significant demand for processed and convenience foods in the ready-to-cook, heat, and serve categories⁶¹.

Western Australia has the capacity to export higher-protein foods such as meat, seafood, pulses, and dairy to the country. Wheat, olive oil, rolled oats and wool are also areas with great potential. Already a significant supplier of pulses and lentils, Australian exports to India in 2012 alone were worth AUD\$414 million⁶². However, aside from a few retail products such as biscuits, fruit juice and cereals, Australian processed food producers remain underrepresented in the Indian supermarket sector, with difficulties in distribution remaining a key obstacle to achieving significant long-term sales. Nonetheless, the challenges facing food distribution in India opens yet more avenues of opportunity for logistics and transport service providers, especially temperature controlled stocking and supply chains⁶³. One Australian success story in this area is Linfox⁶⁴.

3.3 Summary

Evidenced by the many examples of cooperation highlighted above, Western Australia complements India's needs and there remains significant scope for further mutually advantageous interaction. For West-Australian companies, India's many challenges represent fantastic opportunities for diversification into an incredibly large, expanding, and insatiable market. For Indian investors, there are numerous prospects beyond the resource sector in Western Australia that can satiate Indian growth and assist its rise from developing country to economic powerhouse.

In mining and energy, food, services, education and skills training, Western Australia is situated perfectly to become a major contributor in helping India realise its goals, and in the process, expand its own customer base. While the aforementioned examples of cooperation between Australian and Indian companies demonstrate some of the potential successes that can be found by forward thinking investors, it also highlights that there are many more areas waiting to be entered into and developed for mutual Indo-Australian gain.

4. WA and India - Where are we now?

4.1 Economic activity between WA and India: 2003-2013

From the discussion above, it is apparent that Western Australia can provide much of what India needs for continued development. The following section provides a snapshot of how the India-WA relationship is already affecting Western Australia's economy in the areas of trade, education, migration and tourism. The information provided below represents a brief overview of these areas, with more specific statistical data available in appendices 1 - 4.

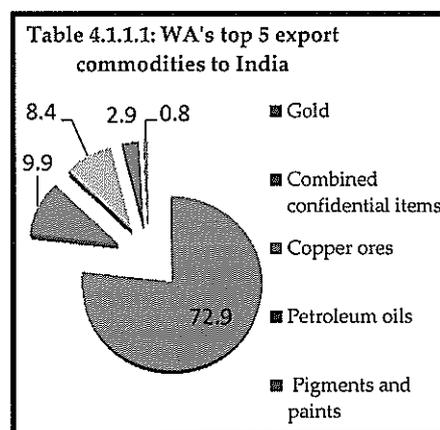
4.1.1 WA merchandise exports to India

As data in Appendix 1 demonstrates, India represents an extremely important export destination for WA⁶⁵. Throughout 2012-13, India was Western Australia's 4th most important export destination, a ranking India has consistently maintained over the last decade. In 2012-13, WA merchandise exports to India were worth \$AUD4.1 billion⁶⁶, representing just over 4% of Western Australia's total export worth.

WA exports to India represented 36% of Australia's total exports to India, and since 2003-4, WA has on average comprised an impressive 46% of all Australian exports to the country.

Despite recent declines in WA exports to India (which peaked in 2009-10 with \$AUD8.6 billion), there has been a total growth of 46% since 2003.

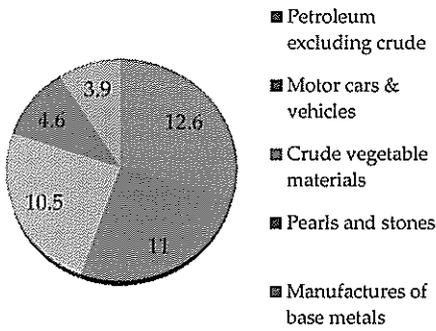
Table 4.1.1.1 provides illustration of the top 5 export commodities in 2012-13, which accounted for 94.9% of all WA's merchandise exports to India.



4.1.2 WA merchandise imports from India

India has provided a steady import source for Western Australia since the turn of the millennium. In 2012-13, India ranked 25th in the list of countries from which WA received imports. Their average ranking from 2003-13 has been 24th. In 2012-13, Western Australia's imports from India were worth approximately \$AUD200 million, representing 9% of the state's total imports. WA imports represented 9% of all Australian imports coming from India in 2012-13, and since 2003, Western Australia has received approximately 10% of Australia's total imports from the country.

Table 4.1.2.1: WA's top 5 import commodities from India



The rate of Western Australian imports from India has been consistent over the last decade, though there has been an increase of 100% since the modest 2003 total. The peak came in 2011-12, when WA imported approximately \$AUD300 million.

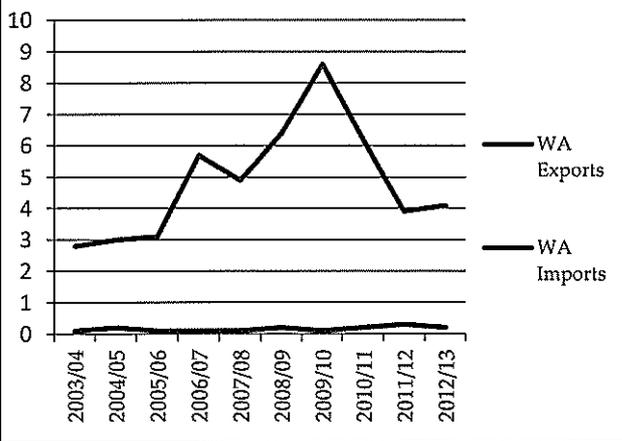
Table 4.1.2.1 illustrates the top 5 import commodities received by WA from India, which accounts for just 42.6% of the total imports

received. This demonstrates the great diversity of imported merchandise WA receives from India.

4.1.3 Total trade and comparison with Australia

As a measure of total trade (that is, exports plus imports), India was Western Australia's 6th most important trading partner in 2012-13, at \$AUD4.3 billion. India trailed China (\$55.5 billion); Japan (\$24.9 billion) Republic of Korea (\$11.5 billion); Singapore (\$7.8 billion) and the United States (\$6.1 billion) in this period⁶⁷. Since 2003, India has on average been our 5th most important trading partner.

Table 4.1.3.1: WA trading growth with India



Western Australia is on the forefront of Australia's Total merchandise trade relations with India. Since 2003, WA provided approximately 42% of Australia's Total trade with the country.

Despite slowdowns in economic activity since 2008-09, data found in Appendix 1 and Table 4.1.3.1 demonstrate that the economic

relationship with India has grown in importance over the preceding decade. Measured over a 10-year period, imports, exports and total trade all demonstrate growth. Moreover, the peak trading years of 2009-10 were double the amount of 2012-13, indicating significant scope for recovery in India-WA trading relations. Furthermore, the requisite ingredients for

continued Indian growth discussed in the preceding section highlights that the foundation for further two-way development in the bilateral economic relationship exists, provided both sides actively engage and take advantage of what the other has to offer.

4.2 Indian students studying in WA's education sector

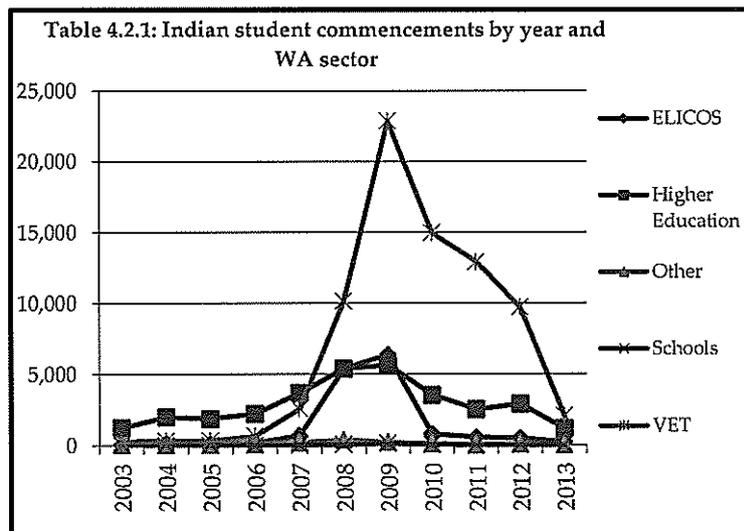
Education is an extremely important and multi-faceted aspect of Australia's bilateral relationship with India. There is an immense market of Indian students desirous of an international education, providing Australia and Western Australia in particular fantastic opportunities. Australia is already a major destination for Indian students studying abroad, in part due to the high quality of the education provided and the cost competitiveness of Australian education services. Despite diminished enrolments and commencements since 2009, India still provides the second-largest source country for overseas students in Australia, after China⁶⁸.

In Western Australia, India accounts for the third largest source of international student, after China and Malaysia. 11,825 Indian students enrolled and 3,521 commenced studies in 1 of 5 possible education sectors in 2012-13. WA accounted for 7% of all Indian students commencing studies in Australia that year.

Tables 6, 7, 8 and 9 (found in Appendix 2), refer to Indian students studying in 1 of 5 WA and/or Australian education sectors. The tables detail both enrolments and commencements, but the details listed below concern only Indian students that commenced studies in WA from 2003-13⁶⁹.

There are 5 broad categories of interest in our education sector:

1. **ELICOS** (English Language Intensive Courses for Overseas Students);
2. **Higher Education**;
3. **Other** (Non-award or Enabling Courses);
4. **Schools** (kindergarten, primary or high school); and
5. **VET** (Vocational Education and Training); and/or **TAFE** (Technical and Further Education), and related institutions.



4.2.2 ELICOS

225 Indian students commenced study in West Australian ELICOS throughout 2012-13, representing 7.1% of the national total for that period. Since 2003, there has been growth of 650% in this sector. The peak year for Indian students studying in an ELICO was 2009, with 6,366 commencements. From 2009-13, there has been a 96% decline in commencements.

4.2.3 Higher Education

Western Australia's Higher Education sector has traditionally attracted the second-largest proportion of Indian students. In 2012-13, there were 1,187 commencements, accounting for 6.7% of the national total. Since 2003, there has been a 4% decline in WA's Higher Education commencements. The peak for Indian students studying in this sector came in 2009, with 5,653 commencements. From 2009-13, there was a 79% decrease in this sector.

4.2.4 Other (Non-award courses/Enabling Courses)

In 2012-13, there were 16 commencements in what is referred to as either 'Other', or 'Non-Award' courses. This sector includes Foundation, Bridging and Enabling courses, plus other courses that do not lead to a qualification under the Australian Qualifications Framework. From Australia's total in 2012-13, WA provided 3.6% of all Indian student commencements. Since 2003, there has been a decline of 78% in this sector. The peak year of enrolment was in 2008, when 398 students commenced studies. Since 2008, there has been a 96% decline.

4.2.5 Schools

There were 15 commencements in 2012-13 for the 'Schools' sector. Western Australian schools accounted for 8.2% of all Indian's studying in Australia in this sector. The peak over the last decade came in 2009, with 158 commencements. Since 2003, there has been a total decline of 77%, with the drop between 2009-13 being 91%.

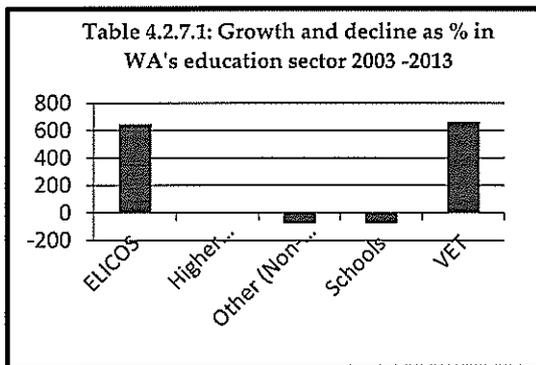
4.2.6 VET

2,078 Indians commenced studies in a West Australian VET in 2012-13, providing 7.1% of the national total. This sector attracted the most students out of any other sector in this year and since 2003, more Indian students have commenced studies in VET than in any other

sector. Between 2003-13, VET commencements have increased by 664%. The peak year for commencements was in 2009, with 22,864 Indian students. Since that year, the decrease in student commencements has been 91%.

International student enrolments in Australia are typically concentrated within a small number of fields and Indian students are no exception. Broadly speaking, 'Management and Commerce' was the most popular field in both higher education and VET for 2012. Typically, 'Management and Commerce' accounts for over half of total enrolments, with 'Engineering and Related Technologies' coming next with less than 10%. This is followed by 'Information Technology', then 'Food, Hospitality and Personal Services', and finally, 'Society and Culture' subjects⁷⁰.

4.2.7 What's wrong with education?



As indicated by the information found in Appendix 2, and Tables 4.2.1 and 4.2.7.1, there have been declines in both student enrolments and commencements over the period 2003-13. Only ELICOS and VET enrolments showed growth.

Recent declines in student visa applications can be attributed to a number of factors, some of which are within Australia's control, others not so. Changes to student visa regulations (for example, requiring international students to demonstrate financial resources), and changes to the General Skilled Migration program (making the transition from international student to permanent resident more difficult) are likely contributors to these declines. The rise of the Australian dollar and increased competition from other countries in the international education market has also contributed to the decrease in student visa applications⁷¹.

International media attention regarding incidents of violence against international students has undoubtedly had damaging effects on Australia's reputation as a safe destination for study, especially among Indian nationals. The Lowy 'India-Australia Poll' conducted in 2013 is particularly informative in this regard, highlighting 'lasting repercussions' from the 2009-10 attacks on Indian students. According to the Poll, concerns linger about student safety in Australia: 61% of those polled believe the attacks on Indian

students were fuelled by racism, and 62% of Indians still regard Australia as a dangerous place for students⁷². Provided sufficient emphasis is placed on promoting Australia as a safe destination and there is no recurrence of the student safety issues of 2009-10, the education of Indian students has demonstrable scope for recovery and the potential to remain a major contributor to the relationship, culturally and economically.

4.3 Migration trends - Indians residing in WA

India has a worldwide diaspora of 25 million people⁷³. An estimated 450,000 of these live in Australia, contributing to what is now the nation's largest and fastest growing migrant community⁷⁴. Table 4.3.1 demonstrates the significant increase in Indian migrants coming to Western Australia as well⁷⁵.

Table 4.3.1: People of Indian ancestry living in Western Australia

Census	Both parents born overseas	Father only born overseas	Mother only born overseas	Both parents born in Australia	Birthplace not stated	Total responses	Growth (%) between Census	Total (%) increase 2001-2011	Australian total	WA % of Australian total
2001	425	690	491	13,356	368	15,330	-	163	156,628	9.8
2006	19,058	1,173	848	701	406	22,186	45		234,722	9.5
2011	36,031	1,548	1,074	1,016	634	40,303	82		390,894	10.3

In the 2001 census, 15,330 people indicated they were of Indian ancestry. By the 2006 census, this increased 45%, with 22,186 people of Indian ancestry residing in WA. Results from the most recent 2011 census indicate growth of 82% over 5 years, with at least 40,303 people of Indian ancestry now calling WA home. Of these, approximately 29,915 were born in India⁷⁶.

Between 2001 and 2011, there has been a 163% increase of people with Indian ancestry living in WA. The state's total population now comprises at least 1.8% of people with Indian ancestry. In 2011 Western Australia's Indians made up 10.3% of all Indian's nationwide.

Indians were amongst the earliest settlers in WA and played an integral role in the development of our fledgling colony. Then, as now, Indians provide an important labour pool of skilled migrants and offer our state cultural diversity and richness. A high proportion of Indian migrants have entered under skilled & business migration categories, especially in fields like medicine, geology and architecture⁷⁷. According to the 2011 census, of the people born in India and now residing in WA, the most common response for occupation was 'Professionals' (26.4%), followed by 'Clerical and Administrative' workers (13.8%), and then 'Technicians and Trades' people (12.3%). The most common industry of

employment was 'Cafes, Restaurants and Takeaway Food Services' (7.2%), followed by 'Hospitals' (6.1%), and 'Supermarket and Grocery Stores' (3.8%)⁷⁸.

The Australian Prime Minister, Tony Abbott, once described Indian migrants as 'model citizens'⁷⁹. If our current Prime Minister is able to fulfil his promise of 'building an even greater friendship between our two countries', then we can look forward to a continuance in the upward trend of Indian migration to WA and the economic and cultural benefits this will bring.

4.4 Indian tourism in WA

Increased Indian migration will also significantly contribute to WA's tourism revenue. According to WA Tourism, 45% of Indian tourists that visit Western Australia cite their reason for coming as visiting family, with just 19% coming for holiday or leisure purposes.

As Tables 4.4.1 and 4.4.2 demonstrate, Indian tourism provides an important and growing source of revenue for the state⁸⁰. An estimated 13,800 Indian tourists visited WA in 2012, representing a 5% increase from the year before.

Table 4.4.1: Indian tourism in Western Australia

Visitor summary	2009	2010	2011	2012	Growth as % (2009-2012)
Spend (\$AUD million)	\$38	\$47	\$48	\$50	32
Estimated Visitors	13,600	12,500	11,900	13,800	1
Estimated Nights	604,600	830,400	497,900	800,000	32
Average Length of Stay (Nights)	44.4	66.6	41.9	57.8	30
Market Share*	11.6%	9.6%	8.5%	9.3%	-20

* Market Share = Indian Visitors to WA divided by Indian Visitors to Australia

In 2012, India provided Western Australia's 11th largest source of international tourist. These visitors spent approximately \$AUD50 million, and over the last 4 years have contributed at least \$AUD183 million to the state's economy.

Between 2009 and 2012, there was a 32% increase in revenue derived from Indian visits to the state, with just a 1% increase in the total numbers visiting. WA tourism from India attracted 9.3% of the total national share in 2012, a decrease of 20% since 2009. In

Table 4.4.2: Indian's reasons for visiting Western Australia

Purpose of visit	Year	Year
	2010/11/12 average	2010/11/12 %
Visiting friends and relatives	5,700	45%
Business	3,000	24%
Holiday or leisure	2,400	19%
Education	1,300	10%
Other	1,800	14%

2012, 63% of all Indian visitors were male, aged between 25-44 years of age⁸¹.

India's immense and growing middle class provides an increasingly affluent, discerning palate and desire to travel. According to a recent survey by Tourism Australia in India, Australia ranked number one for a culinary experience⁸². This increasing awareness and desire to enjoy fine wines and food means our tourism market, particularly the Swan River and Margaret River region has a fantastic future and great potential to benefit from this expanding market base⁸³. Nishant Kashikar, the India manager of Tourism Australia, believes that by 2020, India's overnight visitor spend has the potential to reach between \$AUD1.8-\$2.2 billion, and that visitor numbers could grow to 300,000 annually⁸⁴. Western Australia must ensure that it takes its portion and reverses the declines in market share indicated in Table 9.

4.5 Summary

India's rise is providing a plethora of opportunities for Western Australia. The challenges facing India means it must continue to source resources and services that WA businesses can provide. The Indian Government has progressively liberalised its FDI regime, and due to restrictions on foreign investments gradually being removed and procedures being simplified, WA's entrepreneurs are better placed now than ever before to get involved⁸⁵. Not only has India eased restrictions, they now actively encourage domestic companies to invest overseas.

Outward investment has been growing rapidly in recent years as Indian companies pursue markets, technologies, and resources. From 2018, pundits tip India to replace China as the largest source of new multinationals in the emerging world, and by 2025, India is expected to become one of the top 5 new sources of investment in Australia⁸⁶. Western Australian companies are situated perfectly to benefit from this expansion. However, as recent declines in trade and student activity reflect, if WA does not pay sufficient attention to the Indian market and promote itself effectively, then these opportunities may be lost.

For reasons listed in sections 2, 3 and 4, and a longer-term look at the economic relationship between WA and India⁸⁷, it is apparent that this relationship, significant as it is now, will grow in importance for both sides. The potential for India is obvious, and it is incumbent upon West Australian businesses to ensure they are in on the action. With cooperation, both WA and India can overcome challenges and reap significant reward.

5. Challenges confronting the relationship - Are we doing enough?

Two recent documents that discuss Australia-Indian ties are particularly instructive for the WA-Indian relationship, and form the basis around which observations that follow are set. The first document is the 'India-Australia Poll: 2013', which offers insight into the impressions of Indians toward Australia and Australians on an array of issues⁸⁸. The second document is one produced by Australia's Department of Foreign Affairs and Trade (DFAT), titled 'India Country Strategy: Australia in the Asian Century - Towards 2025'. This document discusses the value of Australian-India ties and offers 3 key strategic pathways for improving relations which Western Australia would do well to emulate:

1. Increased cultural familiarity and exchange;
2. Two-way mobility; and
3. Importance of an informed and selective focus when investing in India⁸⁹.

Using these documents as a framework, we can analyse challenges confronting Australian-Indian ties and determine how the relationship in the economic, education, migration, and tourism sectors may be improved.

5.1 Lowy Polls: 2013

Two separate Lowy Polls conducted in 2013 indicates there is significant scope for improvement in the India-Australia relationship. Measured by 'Degrees of warmth' as an indication of one's feeling toward a country, Australians gave a rating of just 55/100 towards India. This rating was down 3 degrees from 2012, and since the peak of 62/100 in 2006, there has been an obvious downward trend in the warmth Australians feel toward India⁹⁰.

In a different Lowy Poll conducted in the same year, Australia fared little better in the eyes of the Indians. Australia scored just 56/100 degrees of warmth, and only 63% of those polled regard Australia as a country friendly to India. According to this poll, just 51% of Indians believe that Australians are a welcoming or likeable people, and only 49% of all respondents believe Australia is a safe place to visit⁹¹. There is clearly significant scope for improving these relatively poor results.

Recommendation: Investigations should be made into why such negative perceptions of the other exist on both sides, and concerted effort should be aimed at improving them.

5.2 The Economic relationship

Despite growth and the fact that India has on average been our 5th most important trade partner over the last decade, recent declines in our economic relationship indicates there remains room for improvement. Trade and investment suffer from a lack of diversification, which could be addressed by increasing awareness of the others' market and existing opportunities. WA companies often regard investing in India as too difficult, with insufficient return on investment in the short term. India, for its part, frequently views WA as a resource pit and one that is extremely expensive within which to invest. Both these impressions could be countered with greater emphasis placed on educating client markets.

DFAT's first and third strategic approaches are instrumental here. First, there needs to be increased cultural understanding and market familiarity in India and Western Australia, as there is an obvious lack of understanding on both sides. Their third suggestion is that investors from both countries would benefit from an informed and selective focus when looking for investment opportunities. Australia knows India needs minerals and energy, education and skills training, an array of services, and agribusiness development. These areas should be receiving strong focus from public and private corporations alike. Well-researched joint ventures are a good way to enter the Indian market, which due to its enormity, promises to provide significant reward to successful entrants.

The Western Australian government, for its part, should more aggressively market India, develop relations, and promote 2-way investment. To this end, increasing the frequency of high-ranking ministerial delegations from WA to India is imperative. Comparatively, WA as a state lags behind other states for representation and China is receiving a disproportionate share of attention considering the known potential of Indian-West Australian exchange⁹².

Recommendation: India and Western Australia should focus on familiarising and educating the other about their market and of opportunities that exist. WA, especially, would benefit from more high-ranking ministerial delegations promoting Western Australia as an attractive investment destination, beyond mining and commodities.

5.3 Students and education

Indian students and immigrants in Western Australia provide our best opportunity to change the negative perceptions illuminated by the Lowy Polls. As indicated, only 49% of all Indians polled see Australia as welcoming to students⁹³. This poor reflection provides the

WA community with both a targetable area for improvement and an imperative if Western Australia desires continued Indian enrolment in our education sectors.

Of even more concern, and an area that requires immediate attention, is the 62% of Indians that still regard Australia as a dangerous place for students⁹⁴. Australian and Indian efforts to improve perceptions in this regard have been somewhat influential: 53% of Indians agree that it is now safer than it was a few years ago. This improvement highlights the effectiveness of well-targeted public relations campaigns. WA's Indian student population presents a fantastic opportunity for the development of long-term ties, with student exchange providing a great way to realise DFAT's 2nd recommendation, that two-way mobility between countries be improved.

The significant decrease in Indian student activity since 2009⁹⁵ demonstrates the scope for recovery - provided sufficient energy is directed at inviting and welcoming Indian students. Currently, Indian students are 4th on the target list for international student recruitment and despite negative consequences of the 2009-10 student attacks, India still ranks 3rd in WA's international student representation⁹⁶. The resilience of the Indian market in the face of the difficulties discussed serve as reminder of its impressive potential.

Recommendation: Australia must regain the trust of Indian students and India generally. WA should be actively promoting itself as a safe, welcoming place where students receive the world's highest standard of education. The Indian migrant and student communities in WA provide excellent avenues for accomplishing this.

5.4 Migration

As it is with Indian students, increasing the profile and cultural awareness of WA's Indian community would improve understanding and appreciation of our Indian Ocean neighbour. It would also assist in improving the negative perceptions that each country seemingly holds toward the other. Not only do Indian migrants help meet Western Australia's skill shortages, they are instrumental to the broadening and deepening of Australian's cultural familiarity and knowledge of India, and vice versa. This is a critical aspect in developing ties between the two, and will prove an integral aspect in realising DFAT's 1st strategy for improving relations, namely, increasing cultural familiarity and exchange between countries⁹⁷.

Recommendation: WA should be actively promoting cultural awareness and familiarity by increasing the profile of, and celebrating its Indian community.

5.5 Tourism

It is apparent from Table 4.4.2 that a vast majority of WA's tourism derived from India stems from visits to friends and family of migrants residing in the state. With India's middle class becoming increasingly affluent and inclined to travel, there is obvious scope for expanding Indian visits to WA. However, Lowy Polls indicate that only 71% of Indians see Australia as a good place to visit, and just 51% believed Australian's were a welcoming people⁹⁸. This demonstrates the need for concerted efforts aimed at improving the reputation of Australia as a safe and enjoyable tourist destination, beyond visits to friends and family. Focussed tourism campaigns should also make a concerted effort to attract Indian's into regional areas, as only a small portion of the total estimated tourists that came to WA in 2012 ventured outside of Perth⁹⁹.

Furthermore, there currently exists no 'sister-city' ties between Western Australia and India. A sister-city relationship may help improve perceptions of one another by providing a foundation around which to build cultural awareness, generate tourism interest, and improve two-way mobility between sister-cities. Despite the inherent difficulty in establishing such ties, this development would go a long way toward ensuring WA was doing its utmost to fulfil DFAT's 3-point strategy, which encourages forging closer ties.

Recommendation: WA should be actively promoting itself as a friendly, inviting, and attractive tourist destination. Capitalising on India's current interest in Australia's culinary offerings is essential, and concerted efforts should be aimed at getting Indian tourists out of Perth and into regional areas. WA should also move to create 'sister-city' links with carefully selected Indian cities.

5.6 Cricket

Finally, one cannot consider India and a fellow Commonwealth country without at least one reference to cricket. The country's fanaticism for the game is renowned and represents an excellent avenue for improving relations. According to the Lowy Poll, 75% of Indians believe the game carries diplomatic benefits by projecting a positive image of both countries and helps the two grow closer together. The organisation of charitable 'friendlies' could therefore be immensely beneficial in this regard¹⁰⁰.

Recommendation: Cricket must be considered as a diplomatic tool with fantastic public relations potential. 'Friendly' games should be played at the end of each regular season tour to promote the commonalities and mutual interests that exist between the countries.

Conclusion

The intent of this report was to educate Western Australian and Indian audiences of the growing importance of our relationship, and to illuminate the mutual benefits both sides stand to gain from cooperative interaction. To do this, the report began by highlighting India's impressive growth and fantastic potential. It then described some of the more pressing obstacles confronting India's continued development, namely: pressures pertaining to population growth and urbanisation, resource and energy deficiencies, food and water insecurity, and impending skilled labour shortages. The report went on to outline how the WA-India relationship is replete with challenges creating opportunities and cooperation from which both sides have benefitted. Particular emphasis was placed on the bilateral trade relationship, Indian student activity in WA, Indian migration and tourism to Western Australia.

The report found that despite declines in the last several years, the economic trends demonstrate distinct growth over the 2003-2013 decade. The recommendation therefore, is that WA-Indian trading relations are best considered from a medium to long-term perspective - not with short-term focus on quick returns - especially given India's known requirements for further development. Both sides stand to gain from continued interaction, two-way investment and patience, provided there is sufficient awareness on both sides of the challenges and opportunities that exist.

With respect to education, the report demonstrated that Indian student activity diminished in 3 of the 5 possible sectors. The reasons included associated costs of a climbing Australian dollar; increased international competition; Australia's tightening of policy regarding student visas; and strong views in India that Australia is not a safe place for students. Despite all this, India still provides WA's 3rd largest source of international student, and the 2 sectors that did demonstrate growth far outstripped the total declines of the other 3 sectors. This reveals not only the immensity of the Indian market, but indicates there is fantastic capacity for future growth. Given the Indian Government's focus on training and educating its growing population, the future prospects for WA education providers are fantastic.

The 2011 census of population and housing indicated that 40,303 people of Indian ancestry now live in WA. Indian migration has increased 163% between 2001 and 2011, providing WA much needed skills and rich cultural diversity. It also offers opportunities for

raising awareness, familiarity and understanding of the others' culture, which is instrumental to growing long-term ties and improving perceptions that each country holds of the other.

The report demonstrated that Indian migration also does much to promote WA tourism, with Indian's visiting more and spending more in recent years. In 2012, 13,800 Indian tourists visited WA and spent approximately \$AUD50million. India's increasing wealth and middle class propensity for travel means we can expect much more from this tourism market in the future, provided WA actively and aggressively promotes itself as a safe, friendly, and welcoming place to be.

Mutual interests in energy and resources, education and training, food and water security, infrastructure and construction, health and other services, mean potential benefits on both sides from closer ties and teamwork are obvious. Ours is a relationship of growing importance precisely because India will continue to rise in terms of population, economy and overall development. India's market is massive and expanding, providing important opportunities for trade and investment diversification for WA. The report demonstrated that many of the ingredients India requires to overcome obstacles and guarantee continued development are located in the West Australian state, its businesses, and its people.

The recent declines in our economic relationship and the negative views discerned by the Lowy Polls serve to highlight there already exists a ready market with immediate scope for recovery and exciting prospects for future growth, provided sufficient energy is directed toward addressing negative perceptions and downward trends. Both WA and India stand to benefit if they aggressively market themselves and create awareness amongst potential investors from either side. Western Australia, for its part, must make itself known and position itself as a ready and willing participant in the Indian story. Western Australia's people, Government, and businesses owe it to themselves and future generations to ensure they capitalise on the growing opportunities presented by the rise of our Indian Ocean neighbour in the 21st century.

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APPENDICES

APPENDIX 1: Western Australia's merchandise trade relationship with India

Data contained in these tables courtesy of the Department of State Development and the Australian Bureau of Statistics. Catalogue 5368.0. Tables 14a; 14b; 15a; 36e and 37e. August 2013

Table 1: WA's top 5 export commodities to India

Top Five Export commodities in 2012/2013:		AUD\$ million	%
1	Gold, non-monetary (excl. gold ores and concentrates)	2,968.40	72.9
2	Combined confidential items excluding some of SITC 28099 (exports only) and some of SITC 51099 (imports only)	401.9	9.9
3	Copper ores and concentrates, copper mattes and cement copper	343.4	8.4
4	Petroleum oils and oils obtained from bituminous minerals, crude	116.1	2.9
5	Pigments, paints, varnishes and related materials	34.5	0.8
TOTAL:		3,864.30	94.9

Table 2: WA's top 5 import commodities from India

Top Five Import commodities in 2012/2013:		AUD\$ million	%
1	Petroleum oils & oils obtained from bituminous minerals (excl. crude); preparations, containing by weight 70% or more of petroleum oils or of oils obtained from bituminous minerals	31.40	12.6
2	Motor cars and other motor vehicles principally designed for the transport of persons (excl. motor vehicles for the transport of ten or more persons)	27.4	11
3	Crude vegetable materials, nes	26	10.5
4	Pearls and precious or semi-precious stones, unworked or worked	11.5	4.6
5	Manufactures of base metal, nes	9.7	3.9
TOTAL:		106.00	42.6

Table 3: India's ranking as WA's merchandise trading partner

Ranking as a trading partner:	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
WA Exports	4	4	5	3	4	5	3	4	5	4
WA Imports	25	21	30	30	30	27	25	22	19	20
WA Total Trade	4	4	7	3	6	6	3	4	8	6

Table 4: Merchandise trade between WA and India with Australian comparisons

Merchandise Imports, Exports and Total Trade: (AUD\$billion)	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	Growth as % (2003-13)
WA Exports	2.8	3	3.1	5.7	4.9	6.4	8.6	6.2	3.9	4.1	46
WA Imports	0.1	0.2	0.1	0.1	0.1	0.2	0.1	0.2	0.3	0.2	100
Total Trade (exports + imports)	2.9	3.3	3.2	5.8	5	6.6	8.7	6.4	4.2	4.3	48
WA Balance of trade with India	2.7	2.8	3.0	5.6	4.8	6.2	8.5	6.0	3.6	3.9	44
WA Total Exports (not only India)	35	39	48	61	69	87	83	112	120	106	203
WA total imports (not only India)	11.5	13.8	18.5	22	26.4	33.9	27.8	25.9	34.4	33.9	195
Total Australian Exports to India	4.7	5.8	7.4	9.7	9.4	15	15.8	15.7	13.7	11.5	145
Total Australian Imports from India	0.9	1.2	1.2	1.3	1.5	2.1	1.8	2	2.4	2.3	156

Table 5: Merchandise trade between WA and India as percentage with Australian comparisons

Imports, Exports and Total Trade: WA and India (%)	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
WA % of Australian Exports	60	52	42	59	52	43	54	39	28	36
WA % of Australian Imports	11	17	8	8	7	10	6	10	13	9
WA % of Australian Total Trade	52	47	37	53	46	39	49	36	26	31
% of exports to India from WA's Total exports	8	8	6	9	7	7	10	6	3	4
% of imports from India to WA's Total imports	11	17	8	8	7	10	6	10	13	9

APPENDIX 2: Indian international students receiving education in WA and Australia

Australian Trade Commission. *International student data: Basic Pivot Tables 2003-2013*.

Accessed on 1 September 2013. http://www.austrade.gov.au/Education/Student-Data/2013/Pivot-Tables#_UItOB1DOkxvE.

Table 6: Indian international student enrolments in a WA education sector

Sector	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
ELICOS	42	146	206	272	809	5,940	8,826	1,102	698	635	339
Higher Education	3,414	4,586	5,790	6,658	8,631	11,974	15,745	15,963	11,154	8,705	4,055
Other	157	91	123	139	257	506	520	396	141	128	52
Schools	124	116	90	93	102	119	230	250	144	98	57
VET	944	713	761	1,139	3,469	13,796	39,616	49,856	36,620	26,172	7,322
Total	4,681	5,652	6,970	8,301	13,268	32,335	64,937	67,367	48,757	35,738	11,825

Table 7: Indian international student commencements in a WA education sector

Sector	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% of growth (2003-13)	% decline since peak	% of national total (2013)
ELICOS	30	134	110	188	701	5,412	6,366	790	554	503	225	650	96	7.1
Higher Education	1,242	2,006	1,890	2,242	3,699	5,398	5,653	3,555	2,526	2,921	1,187	-4	79	6.7
Other	73	55	87	115	209	398	244	132	45	92	16	-78	96	3.6
Schools	64	32	30	45	42	71	158	70	36	26	15	-77	91	8.2
VET	272	329	341	671	2,581	10,160	22,864	14,960	12,920	9,720	2,078	664	91	7.1
Total	1,681	2,556	2,458	3,261	7,232	21,439	35,285	19,507	16,081	13,262	3,521			
WA's % of Australian total	2.7	2.8	2.5	2.2	2.6	5.2	7.1	6.5	6.7	6.9	6.9			

Table 8: Indian international student enrolments in Australia's education sector

Sector	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
ELICOS	2,396	8,107	8,462	19,164	62,984	112,094	107,858	17,087	9,593	9,842	4,493
Higher Education	115,424	169,052	223,692	252,784	268,066	273,958	280,349	241,560	163,800	126,950	61,962
Other Schools	1,182	1,336	1,348	2,471	4,805	6,014	8,658	3,591	1,542	1,692	854
VET	579	563	528	660	928	1,063	1,639	1,633	1,231	949	465
Total	14,619	14,165	30,550	82,784	228,832	454,880	735,951	725,580	520,676	384,110	113,551
Total	134,579	194,189	266,010	361,014	565,615	848,009	1,134,455	989,451	696,842	523,543	181,325

Table 9: Indian international student commencements in Australia's education sector

Sector	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
ELICOS	2,036	5,899	6,026	14,652	54,248	94,154	79,922	12,167	8,237	7,706	3,179
Higher Education	53,360	75,908	70,740	79,624	88,606	89,602	84,941	46,476	36,780	43,286	17,640
Other Schools	678	844	808	1,679	3,221	3,926	4,566	1,695	726	1,248	440
VET	171	191	276	276	496	475	991	565	451	325	183
Total	4,767	6,845	18,886	47,888	128,764	222,140	328,767	237,084	194,720	138,542	29,401
Total	61,535	90,881	98,058	147,066	275,335	410,297	499,187	297,987	240,914	191,107	50,843

APPENDIX 3: People of Indian Ancestry migrating to Western Australia

Data derived from Australian Bureau Of Statistics, Census of Population and Housing, 2011 QuickStats Country of Birth - Census - all people - usual residents.

Table 10: People in Western Australia who were born in India (2011)

People	29,915
Male	16,284
Female	13,631
Australian citizen	50.60%
Not an Australian citizen	47.60%

APPENDIX 4: Indian tourism in Western Australia

Data derived from WA Tourism statistics:

India Visitor Profile: Overnight Visitor Fact Sheet, Years Ending December 2012.

Table 11: Indian area of visitation in Western Australia (2012)

Area of visit - 2012	Estimated visitors	Estimated visitor nights	Average length of stay (nights)
Experience Perth	12,400	650,100	52.6
Australia's South West	1,100	10,400	9.1